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CACS Overview | The Institute of Banking and Finance

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The PB Code sets out standards of good practice on competency and market conduct expected of private banks. Under the PB Code, private banking professionals (or “Covered Persons”) are expected to pass a common competency assessment called the Client Advisor Competency Standards (CACS) before they provide any financial advice. The CACS took effect from 1 September 2011.

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Client Advisor Competency Standards (CACS) Study Guide: Wealth management industry and product knowledge. Paper 2. Institute of Banking & Finance, 2011 - Investment advisors - 274 pages. 0 Reviews. What people are saying - Write a review. We haven't found any reviews in the usual places.

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Private Banking Code of Conduct (PB Code)

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Client Advisor Competency Standards Paper 1 Questions

This programme is eligible for funding under the IBF Standards Training Scheme (IBF-STTS), subject to participants meeting all eligibility criteria and successfully completing Client Advisor Competency Standards (CACS) Papers 1 and 2.

IBF Level 1 - WMI

If the assistant relationship manager (ARM) concerned meets the definition of "overed Person" under the P ode, the ARM would need to pass the competency assessment - Client Advisor Competency Standards (CACS) before he can provide financial advisory services to his clients.

Private Banking Code of Conduct (PB Code)

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Participants who complete the Bridging Elective and Client Advisor Competency Standards (CACS) Papers 1 and 2 will be: Eligible for the "IBF Qualified" certification status for "Wealth Management - Relationship Management - Private Banking" under the IBF Standards Level 1. Eligible for CPD hours.

IBF Level 2/3

Handle complex client inquiries and questions, working with the relevant partners until resolution Take the lead in administrative tasks including meeting set-up, scanning, filing, copying, phone coverage Must be a self-starter with the ability to set high standards of meeting deliverables

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Competencies:-Keeping the machines always with hygenical standards and high maintainance skills-Cash handling expert-Constant knowledge of hygenical standards and hazards in order to give more safety to the shop Personal skills:-Organized and efficient server-Corteous and professional-Quick problem solver

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